

Citrus College

Position Description

Position: Financial Aid Assistant	Position Number:
Department/Site:	FLSA: Non-exempt
Reports to:	Salary Range: 28

Summary

Performs general and specialized clerical duties related to processing information for student grant and other financial aid programs. Maintains student financial obligation records. Provides technical assistance and information to students, staff and the public.

Distinguishing Career Features

The Financial Aid Assistant is the first in a multi-tiered career path for financial aid transaction processing. To qualify for this level, prospective incumbents must demonstrate the ability to verify eligibility and process financial aid documents. Advancement to the Financial Aid Technician level requires advanced knowledge of student financial loan programs, student and financial aid databases, and the ability to counsel students on program and payment options.

Essential Duties and Responsibilities

- Serves as first point of contact for the office on phones and at front counter. Disseminates general financial aid information to students and the public.
- Assists students and parents with FAFSA financial aid applications, processing procedures, and interpreting policies of the funding organizations. Explains the different types of financial aid programs, including obligations and payment schedules.
- Instructs students in correct procedures for completion of forms and applications, special requirements and restrictions, and supporting documentation such as tax returns, income and housing verifications, and transcripts. Reviews completed forms for accuracy and completeness.
- Assists students to understand the relationship between financial aid awards and course load, grades, and other student achievement factors.
- Processes applications and calculates awards for local financial aid and grants using established procedures and guides. Enters information into computer-aided databases.
- Schedules appointments for students to see Financial Aid Counselors. Compiles information to support conferences.
- May prepare standardized correspondence for/to students, verifying status and other information.
- Performs miscellaneous clerical duties for the office such as updating policy and procedure manuals and award tables, editing student files, replenishing forms and

communication devices, collecting data for reports, and preparing general correspondence.

- Performs other duties as assigned that support the overall objective of the position.

Qualifications

▪ Knowledge and Skills

Requires a basic knowledge of the policies and procedures associated with financial aid programs including grants and waivers. Requires a basic knowledge of federal and institutional satisfactory academic progress policy. Requires a basic knowledge of regulations and institutional policies relevant to admissions, registration, accounts payable, and financial aid practices. Requires knowledge of and skills with routine office policies, procedures and equipment, including PCs and applicable student information databases, word processing and spreadsheet applications. Requires sufficient English language skill to prepare routine correspondence. Requires sufficient human relation skills to provide general information to student-customers, exercise patience when dealing with students, and convey a positive image of the college. Requires sufficient math skills to compute principal, interest, sums, percents, and ratios.

▪ Abilities

Requires the ability to perform all of the duties of the position efficiently and effectively with minimal supervision. Requires the ability to perform basic record keeping, data entry, file maintenance, and report writing duties. Requires the ability to communicate program elements and requirements with students, faculty and outside agencies/customers. Requires the ability to instruct students on the financial aid application process and to resolve conflict. Ability to perform data entry onto an automated information system. May require the ability to perform assignments on varying work schedules.

▪ Physical Abilities

Incumbent performs work of predominately a sedentary nature. Requires ambulatory ability to sit in front of a computer screen for extended periods of time, to move about between work station and customer service counters, and to reach for work materials and files. Requires sufficient hand, arm, and finger dexterity to operate computer keyboard, typewriter or other office equipment. Requires visual acuity to read words and numbers. Requires speaking and hearing ability sufficient to hear over phone and carry on routine conversations.

▪ Education and Experience

The position requires a high school diploma and two years of related work experience such as in loan origination or servicing, financial aid or basic accounting.

▪ Licenses and Certificates

May require a valid driver's license.

▪ Working Conditions

Work is performed indoors where minimal safety considerations exist.